APPENDIX H: THE COLLECTIONS MANAGEMENT REPORT

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A. Overview

1. *What is the Collections Management Report?*

The Collections Management Report (CMR) is an annual report that provides information on the size of your museum collection and collection activity during the fiscal year. The report tracks accessions, deaccessions, cataloging, and use of collections. Your CMR should present an accurate picture of your current museum holdings and the past year's collection activity, regardless of where the objects are located.

The Park Museum Management Program (PMMP) in WASO uses the CMR to produce service-wide statistics on NPS museum collections.

2. *Do I have to create a CMR?*

No. The PMMP will complete a CMR for you, based on the National Catalog submission you provide. Refer to Chapter 9, Section II.E, for information on the National Catalog submission.

3. *What do I need to provide to PMMP for completing the CMR?*

You must annually provide a National Catalog submission on or before September 15th, and an email to WASO_CMR_Submission@nps.gov. The email must include the number of research requests from within the park and from outside the park, and any noteworthy comments you want included on the CMR.

4. *How do I access the CMR completed by the PMMP?*

Go to http://inside.nps.gov/cmr and click on your park acronym.

5. *How do I get an **ANCS+** version of the CMR?*

Send an email to WASO_CMR_Submission@nps.gov requesting that an **ANCS+** version of the CMR be sent to you.

6. *How do I adjust the CMR?*

After reviewing the CMR at http://inside.nps.gov/cmr, send an email to WASO_CMR_Submission@nps.gov requesting a change.

7. *When might I want to adjust the numbers reported on the CMR?*

At times you may need to make adjustments to the numbers in your CMR. For example, you might need to adjust:

- the backlog if past backlogs were incorrectly estimated.
- accession numbers if you incorrectly estimated the number of items in an accession.
- the number of newly catalog objects. Since the CMR determines if a catalog record is newly submitted by the Logger Date, records created in previous fiscal years, but submitted to the National Catalog for the first time during the fiscal year, will be counted as having been cataloged in previous years. However, because the records are being submitted to the National Catalog for the first time, the records should be counted as new cataloging. You will have to subtract the objects covered by these records from the number of objects cataloged in previous years, and add the objects to newly cataloged objects.
- the number of outgoing loans if you have records with a status of outgoing loan, but no loan records in the Loans Out associated module.
- the number of objects on exhibit if you didn't update the Object Status

field when objects were taken off exhibit.

8. *Can I create a CMR myself?*

Yes, but the CMR on file with PMMP will be the CMR used for service-wide statistics and reports, including GPRA. However, if you wish to complete your CMR yourself, follow the instructions in this appendix. Also, refer to the *MH-II*, Chapter 4, Special Instructions, for guidelines on completing the CMR.

9. *How does center information get incorporated into the park CMR?*

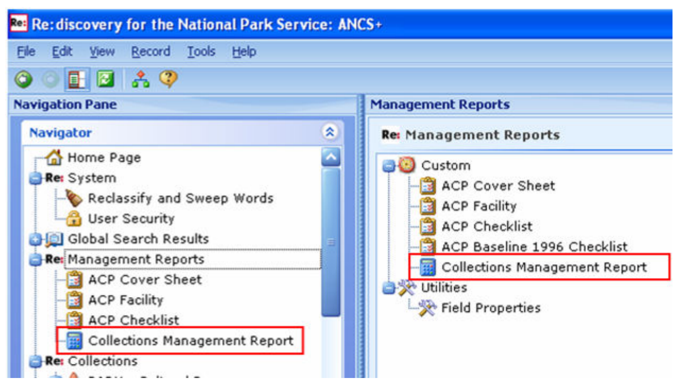
PMMP compares the National Catalog submission made by the center to the National Catalog submission made by the park. Only cataloged objects which appear in the center's submission and are absent in the parks submission are added to the park CMR.

B. Running the CMR

1. *How do I access the CMR?*

To access the CMR:

- On the Home Page, double-click Re: Management Reports, *or*
- From the Navigation Pane, expand or single-click Re: Management Reports.



- In the Management Reports page in the right pane, double click Collections Management Report, *or*
- In the Navigation Pane, single click Collections Management Report, *or*
- Go to the View menu on the menu bar and select Collections Management Report from the Go To submenu.

Note: the CMR you create locally will not be used for reporting purposes. The Park Museum Management Program (PMMP) will complete a CMR for you, based on the National Catalog submission you provide.

2. *What do I need to know to run the CMR?*

To run the CMR, you must know:

- your park acronym
- the year of the report
- your center acronym, if you are completing a center report

- the **ANCS+** Cultural Resources and Natural History directories for your park

3. *How many pages does the CMR have?*

The CMR consists of four pages:

- Summary
- Accessions
- Deaccessions
- Cataloging/Use

4. *What steps do I follow to complete the CMR?*

To complete the CMR:

- Enter the park, year, and directories for the report you are creating.
- Extract the data from **ANCS+**
- Adjust the numbers from the previous year's CMR, if needed.
- Review and adjust the numbers for accession types and disciplines.
- Review and adjust the numbers for deaccession types and disciplines.
- Review and adjust the numbers for cataloging.
- Review and adjust the numbers for outgoing loans and exhibits.
- Enter the number of research requests from within and outside the park.
- Review the collection summary data and add noteworthy information on the collection.
- Verify the numbers, if needed, using the verification reports in Section I below.
- Complete the information on who completed and will approve the report.

5. *Does running the CMR change the catalog data in **ANCS+**?*

No. Running the CMR doesn't change **ANCS+** collection level databases. The CMR extracts information from existing records, but doesn't modify them. You cannot change your records from the CMR. You must go to the appropriate database to make changes to your data.

6. *What will the CMR do?*

The CMR:

- extracts data from **ANCS+**
- allows you to adjust the data you extract
- totals data automatically
- maintains previous year's CMR data
- prints the CMR, Form 10-94Rev.

- allows you to transfer the CMR files to a disk or other location for electronic submission

7. *Do I need special security rights to run the CMR?*

Yes. You need Administrator security access to run the CMR.

8. *Can I run the CMR for more than one park or different collections within one park?*

Yes. The CMR allows you to pull data from different directories. You can run individual reports for each park collection that you manage. You will also be able to run one report that combines the data for parks that contain different collections under one acronym.

9. *How do I add a CMR?*

To add a CMR:

- Click the Add button on the button bar, *or*
- Go to Edit on the menu bar and select Add New Record, *or*
- Press F9.

A new window will open with a blank CMR and "Add Mode" will appear on the status bar in the lower right corner. You can then add and save data.

10. *How do I modify a CMR?*

To modify CMR data that you have previously saved, select the CMR you wish to modify, then:

- Click the Modify button on the button bar, *or*
- Go to Edit on the menu bar and select Modify This Record, *or*
- Press F10.

11. *How do I move between pages?*

To move between pages:

- Click on the tab for the page you want, *or*
- Press Ctrl-N (next page) or Ctrl-R (previous page)

12. *How do I cancel the CMR?*

To cancel the CMR without saving the data:

- Click Cancel in the bottom right corner (you may have to scroll down and over to see the Cancel link), *or*
- Click the Cancel button on the toolbar, *or*
- Select Cancel from the File menu.

13. *How do I save the CMR?*

To save the CMR:

- Click the Save and Close link in the bottom right corner (you may have to scroll down to see the Save and Close link), *or*
- Click the Save and Close button on the button bar, *or*
- Select Save and Close on the File menu, *or*

- Press F2

Note: You can also use the Save option instead of Save and Close. Save leaves the record window open in View mode after saving while Save and Close closes the record window after saving.

You don't need to save data before going to the next screen.

C. Frequent Questions About the CMR

1. *What is the structure of the CMR?*

The CMR consists of three sections:

- I. Total Collection Summary from Previous Year (on the summary page)
- II. Collection Summary for Fiscal Year consisting of four parts:
  - A. Accessions (on the accessions page)
  - B. Deaccessions (on the deaccessions page)
  - C. Cataloging (on the cataloging/use page)
  - D. Use of Collections (on the cataloging/use page)
- III. Total Collection Summary for all Years (on the summary page)

2. *How does the CMR factor numbers for cataloged objects?*

The number of cataloged objects reported on the CMR comes from the CR and NH catalog records for the directories that you selected. The system pulls data from the Item Count or Item Quantity fields for each catalog record. The CMR does not count records for objects that have been deaccessioned, and the CMR does not count records with an Object Status of:

- Draft Record
- Loan Returned
- Incorporated into Larger Archival Collection
- Record Inactive
- Removed-Non-Museum Property

Discipline is determined by the first line of the classification (fourth line of the classification for archives).

The CMR uses the number in the Item Count field, if available. If there is no number in the Item Count field, the CMR goes to the Item Quantity field. The CMR counts an Item Quantity greater than zero as one, except for archives. The CMR multiplies the Item Quantity by 1600 for every record with a Storage Unit of LF (linear feet) or CF (cubic feet).

3. *Can I use the button bar and menu bar functions with the CMR?*

Yes. Most of the button bar and menu bar functions work with the CMR. The following functions don't work with the CMR:

- imaging
- word search

The CMR doesn't contain supplemental records or use the associated modules. Refer to Chapter 1, System Basics, for information on the button bar and menu bar functions.

4. *What do I do if the data in my CMR don't appear to be correct?*

Run the CMR verification reports listed in Section I of this appendix. These reports will show you how the program pulled the numbers for the report. You can then make adjustments to the CMR numbers as needed. You can also make changes to your databases and rerun the CMR. For example, if you haven't entered all the accessions for the year, you can add them and rerun the CMR.

5. *How do I delete a CMR record?*

To delete a CMR record:

- Select the record that you want to delete so that it is loaded in the Record Pane.
- Go to the Edit menu and select Delete Record(s),
- then select Delete This Record
- The program will ask if you are sure you want to delete the record. Click "Yes" to permanently delete the record. Click "No" to return to the screen.

Note: Be extremely careful when using this option. Since you must have full security rights to be in the CMR, you have the capability to delete all records. Be sure to select "Delete This Record." Don't delete your previous year's CMR. The system uses this CMR to generate the numbers in Section I.

6. *What do I do if I'm interrupted before I complete the CMR?*

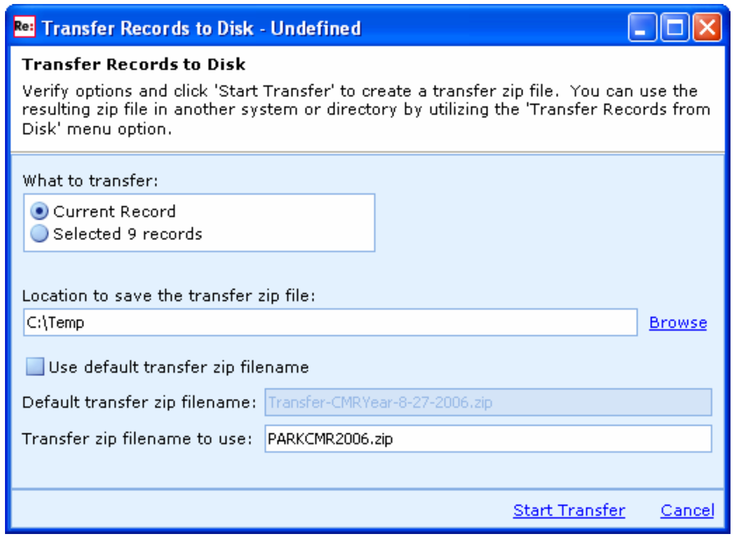
Once you generate the numbers and complete the completion information fields, you can save the record. You can then complete the CMR at a later date.

To find your CMR, use the List Pane to scroll to the current CMR for your park. Click on the record in the List Pane and it will be loaded into the Record Pane below.

7. *How do I transfer the CMR record to a file?*

To transfer your CMR record to a file:

- Have the CMR that you want to transfer loaded in the Record Pane.
- Go to the File menu and choose Transfer Record(s) to Disk from the Transfer menu. The transfer window will open.



- Choose Current Record for what to transfer.

- Select the location to save the transfer zip file. Enter a path or click Browse to select a location to save the file. You can save it to a disk or a folder on your hard drive.

- Uncheck the Use default transfer zip filename.

- Enter the Transfer zip filename to use with the following format: park acronym + CMR + fiscal year with .zip on the end. For example: BANDCMR2006.zip

- Click Start Transfer.

Note: To transfer multiple reports, you must activate a tag set, filter or select multiple records in the List Pane using Ctrl-click or Shift-click. Then in the Transfer Records to Disk window, select "Selected # records" instead of Current Record for what to transfer.

8. *How do I load a CMR record from a disk or other drive?*

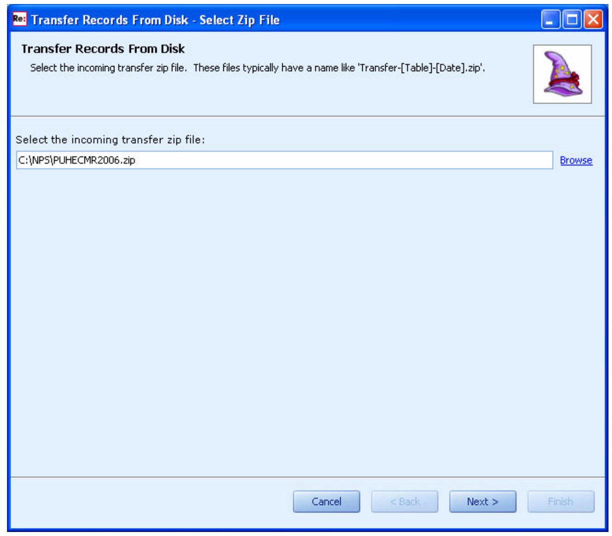
To load a CMR file:

- Insert the disk with the CMR transfer zip file into your computer's disk drive (usually the a: drive), or note the location of the CMR file on your local hard drive or network drive.

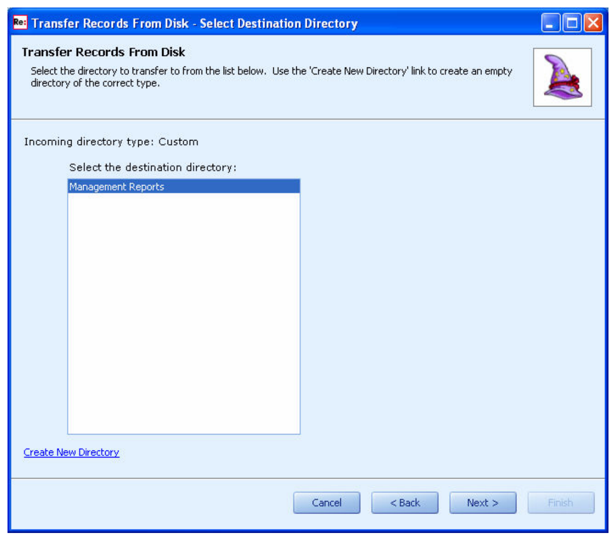
- Go to the CMR screen.

- On the File menu, select Transfer Record(s) from Disk on the Transfer menu.

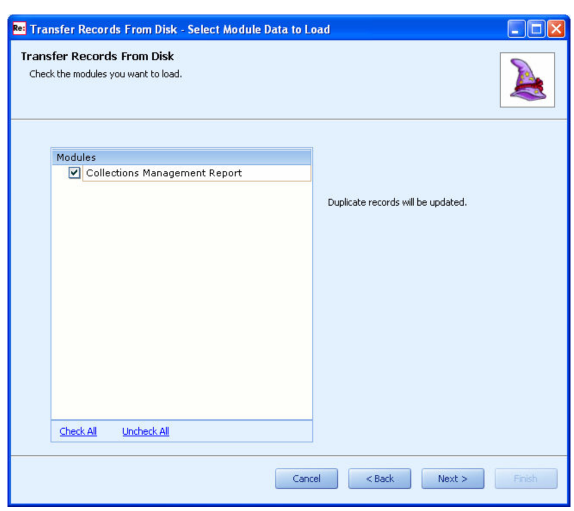
- In the Transfer Records from Disk window, enter the path and filename of the incoming CMR transfer zip file or click Browse to navigate to and select the CMR transfer zip file you wish to load.



- After selecting the transfer zip file, click Next.

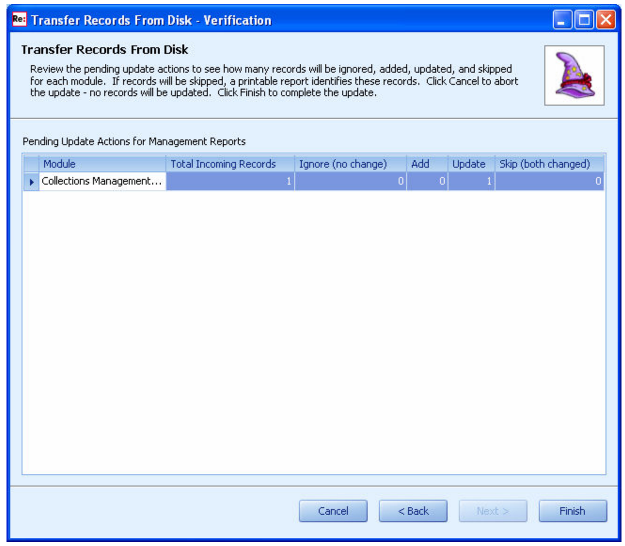


- The Management Reports directory is selected automatically. Click Next.

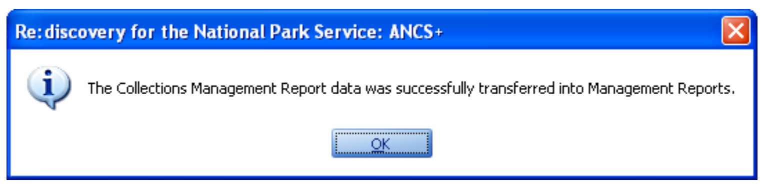


- Collections Management Report is checked automatically. Click Next.

- You will see a message that the transfer zip data will be extracted and the update actions will be determined. Click Yes to continue.



- The Pending Update Actions indicate how many incoming CMR records are in the transfer zip file and how many records will be updated in your system. Click Finish to complete the transfer.

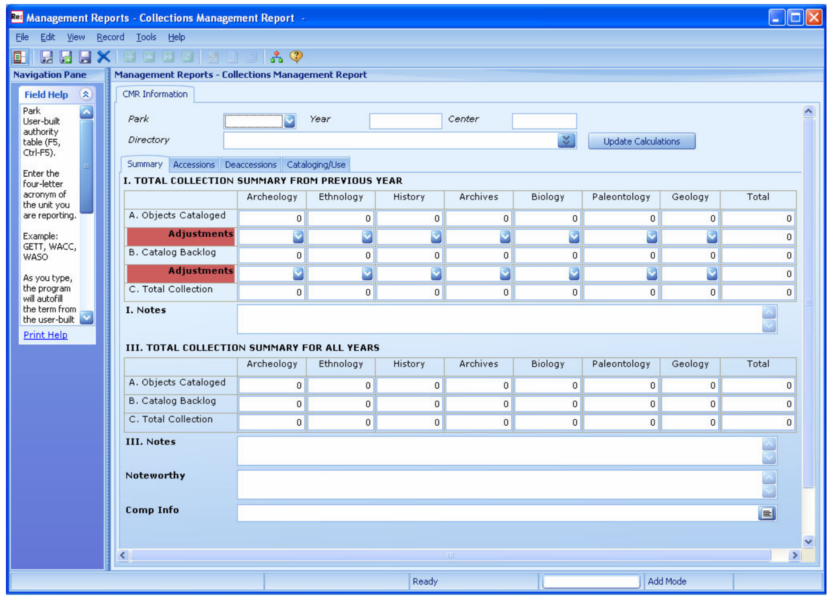


- You will receive a message that the data was transferred successfully. Click OK.

The CMR record is now available in your Collections Management Report directory.

Note: If you are in the Collections Management Report directory when you load the new or updated record, you will have to click the Refresh button on the button bar or select Refresh from the Edit menu for the record to appear in the List Pane.

D. Summary Screen



1. *How do I complete the information on the CMR Information tab at the top?*

Follow the field-by-field instructions for completing the fields on the screen. You can also view the on-line Field Help for each field in the Navigation Pane. Remember the CMR on file with PMMP will be the CMR used for service-wide statistics and reports, including GPRA. You are not required to complete a CMR at the park (see Section A above). Complete the Park, Year, Center and Directory fields as follows:

Park

Single-entry authority table field (F5, Ctrl F5). **To save a CMR, you must complete this field.**

Enter the four-letter acronym of the unit.

As you type, the park acronym will complete from the list of park acronyms. To view and select an acronym from the list, press F5 or click the down arrow.

If you are a new park, to add your acronym to the list, press Ctrl-F5 or right click in the field and select Browse Authority table. Click Add Term and enter the new acronym and park name. Click Save Change and then Select to enter the term in the Park field.

Year

Straight entry numeric field.

Enter the fiscal year for which you are submitting the report. Enter the complete year.

Example: 2006

Center

Straight entry field.

Enter the four-letter acronym of the center for which you are reporting. If you are submitting a park report, leave this field blank.

Note: A center is a repository that stores collections for a park. Some NPS centers also have their own collection.

Directory

Stacked authority table (F5, F12) of directories that are available on your system.

Select the directories that contain the data for you park.

To obtain a complete report, you must select both the CR and NH directories for a park.

As you type, the directory name will complete from the list (e.g., CR PARK). To view and select entries from the table, press F5 or the down arrows.

To make multiple entries, press F12. In the expanded window, a new line will appear just below the first entry. Enter the second directory name (e.g., NH PARK) or press F5 or click the down arrow to view and select the directory from the list. To continue adding directory names, click Add for a new entry line and enter or select the next directory name from the list. Click Save when you have finished selecting directories. A double dash (--) separates entries on the screen.

Press Ctrl-Del to remove unwanted entries.

2. *What is the Update Calculations button?*

Use the Update Calculations button to recalculate the totals for each section if you enter adjusted numbers in the Adjustments fields on any page. You can either click the button after making adjustments in each section, or wait to the end and click Update Calculations once to recalculate all sections at the same time.

3. *How do I complete the fields on the Summary screen?*

Follow the field-by-field instructions for completing the fields on the screen. You can also view the on-line Field Help for each field in the Navigation Pane.

4. *How do I complete Section I. Total Collection Summary from Previous Year?*

To generate the data for the collection summary, click the Get Catalog Data button at the bottom left of the screen (you may have to scroll down on the screen to locate the button). This will pull data from the previous year's report and from any directories that you designated in the Directory field. The length of time it takes to get the data is directly proportional to the size of your databases.

The Get Catalog Data button appears on all screens of the CMR, but you only need to use this button once.

I.A. Objects Cataloged

The program generates the number of items cataloged in previous years from the CR and NH catalog records for the directories that you selected. The system pulls data from the Item Count or Item Quantity fields for each catalog record where the Logger Date is prior to the start of the current fiscal year.

The CMR does not count records for objects that have been deaccessioned, and the CMR does not count records with an Object Status of:

- Draft Record
- Loan Returned
- Incorporated into Larger Archival Collection
- Record Inactive
- Removed-Non-Museum Property

Discipline is determined by the first line of the classification (fourth line of the classification for archives). The system automatically totals the numbers from the discipline columns. The total will appear in the total column. The disciplines are: archeology, ethnology, history, archives, biology, paleontology, and geology.

You cannot edit these fields, but you can adjust the numbers in them by using the adjustment fields.

I.A. Objects Cataloged Adjustments

You can increase or decrease the number of objects cataloged. These fields will accept negative numbers. There is a column for each discipline and a total column.

Note: Enter the amount (or increment) of change, not the new number. For example, to add 3 objects to 100 objects, enter 3 in the adjustment column, not 103. To subtract 3 objects from 100, enter -3 in the adjustment column, not 97.

If you enter any numbers in the adjustments fields, the program does not automatically total the adjusted numbers. To recalculate the totals to include the adjusted numbers, you must click the Update Calculations button next to the Directory field.

The adjusted total will appear in the total column. The disciplines are: archeology, ethnology, history, archives, biology, paleontology, and geology.

Note: The program computes new totals if you make changes, but only saves the changes for the current report. The previous year's report (the report from which these data are extracted) doesn't change.

I.B. Catalog Backlog

The program generates the number of items that were counted as backlog cataloging in the previous fiscal year. These data are pulled from the CMR that is in the database for your unit for the previous year. If you don't have a CMR in your database from the previous year, these fields will contain zeroes. There is a column for each discipline and a total column. **You cannot edit these fields, but you can adjust the numbers in them by using the adjustment fields.**

The system automatically totals the numbers from the discipline columns. The total will appear in the total column. The disciplines are: archeology, ethnology, history, archives, biology, paleontology, and geology.

I.B. Catalog Backlog Adjustments

You can increase or decrease the backlog number. These fields will accept negative numbers. There is a column for each discipline and a total column.

Note: Enter the amount (or increment) of change, not the new number. For example, to add 3 objects to 100 objects, enter 3 in the adjustment column, not 103. To subtract 3 objects from 100, enter -3 in the adjustment column, not 97.

If you enter any adjustments, remember to click the Update Calculations button to recalculate the totals for the disciplines. The adjusted total will appear in the total column. The disciplines are: archeology, ethnology, history, archives, biology, paleontology, and geology.

Note: The program computes new totals if you make changes, but only saves the changes for the current report. The previous year's report (the report from which these data are extracted) doesn't change.

I.C. Total Collection

The program automatically totals the discipline and total columns in Section I. The disciplines are: archeology, ethnology, history, archives, biology, paleontology, and geology.

Note: If you have entered any adjustments, make sure to click the Update Calculations button to recalculate the totals for these fields.

You cannot edit these fields

I. Notes

Memo field (F12 or right-click and select zoom to expand).

Enter explanations for adjustments to the data in Section I. These comments will not appear on the final report.

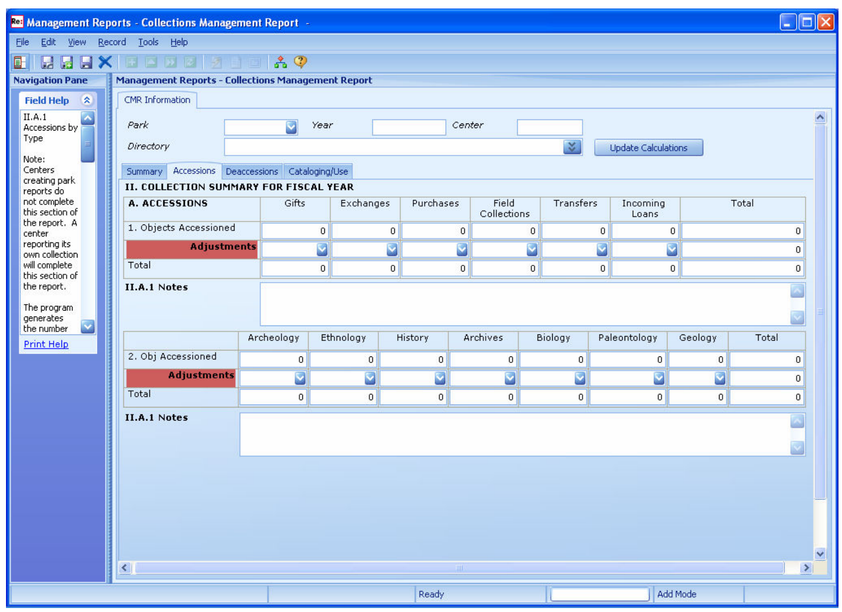
5. *Why does Section III appear on the first screen after Section I?*

Sections I and III appear on the same screen so that you can compare summary data. You must complete Section II in order for the system to generate the numbers in Section III. Refer to Section G of this appendix for information on Section III of the CMR.

6. *What do I do after completing Section I?*

Go to the Accessions screen to continue. Click on the Accessions tab or press Ctrl-N to go to this page.

E. Accessions Screen



1. *How do I complete Section II.A. Accessions?*

Follow the field-by-field instructions for completing the fields on the screen. You can also view the on-line Field Help for each field in the Navigation Pane.

You must complete the CR and NH Totals fields in the Accession Records associated module to use this section of the program. The CMR uses the actual numbers, if available. If there is no entry in the actual field, the CMR uses the estimated numbers. Except for archives, the CMR ignores the numbers in the bulk field. For Archives, if the archival unit is Cubic Feet or Linear Feet, then the number entered in the bulk field is multiplied by 1,600. Refer to Section I of Chapter 4 for information on the Accession Records associated module.

II.A.1. Objects Accessioned (Acquisition Type)

The program generates the number of objects by acquisition type that were accessioned during the fiscal year of report. There is a column for each acquisition type and a total column. **You cannot edit these fields, but you can adjust the numbers in them by using the adjustment fields.**

The system automatically totals the numbers from the acquisition type columns. The acquisition types are: gift, exchange, purchase, field collection, transfer, and incoming loan.

The data for this section of the CMR comes from the Accession Records associated module for the directories that you selected. The system pulls data from the subfields in the CR and NH Totals fields. The system uses the Acquisition Date field to determine that the accession falls within the fiscal year of the report. The date in the acquisition field must be all digits in the form of mm/dd/yyyy for the CMR to be able to read it.

II.A.1. Objects Accessioned (Acquisition Type) Adjustments

You can increase or decrease the number of accessioned objects. These fields will accept negative numbers. There is a column for each acquisition type and a total column.

Note: Enter the amount (or increment) of change, not the new number. For example, to add 3 objects to 100 objects, enter 3 in the adjustment column, not 103. To subtract 3 objects from 100, enter -3 in the adjustment column, not 97.

If you enter any adjustments, remember to click the Update Calculations button to recalculate the totals for the acquisition types. The adjusted total will appear in the total column. The acquisition types are: gift, exchange, purchase, field collection, transfer, and incoming loan.

II.A.1. Objects Accessions (Acquisition Type) Total

The program automatically totals the acquisition type and total columns in Section II.A.1. The acquisition types are: gift, exchange, purchase, field collection, transfer, and incoming loan. **You cannot edit these fields.**

Note: If you made any adjustments, remember to click the Update Calculations buttons to recalculate the totals.

II.A.1. Notes

Memo field (F12 or right-click and select zoom to expand).

Enter explanations for adjustments to the data in section II.A.1. These comments will not appear on the final report.

II.A.2. Objects Accessioned (Discipline)

The program generates the number of objects by discipline that were accessioned during the fiscal year of report. There is a column for each discipline and a total column. **You cannot edit these fields, but you can adjust the numbers in them by using the adjustment fields.**

The system automatically totals the numbers from the discipline columns. The disciplines are: archeology, ethnology, history, archives, biology, paleontology, and geology.

The data for this section of the CMR comes from the Accession Records associated module for the directories that you selected. The system pulls data from the subfields in the CR and NH Totals fields. The system uses the Acquisition Date field to determine that the accession falls within the fiscal year of the report. The date in the acquisition field must be all digits in the form of mm/dd/yyyy for the CMR to be able to read it.

II.A.2. Objects Accessioned (Discipline) Adjustments

You can increase or decrease the number of accessioned objects. These fields will accept negative numbers. There is a column for each discipline and a total column.

Note: Enter the amount (or increment) of change, not the new number. For example, to add 3 objects to 100 objects, enter 3 in the adjustment column, not 103. To subtract 3 objects from 100, enter -3 in the adjustment column, not 97.

If you enter any adjustments, remember to click the Update Calculations button to recalculate the totals for the disciplines. The adjusted total will appear in the total column. The disciplines are: archeology, ethnology, history, archives, biology, paleontology, and geology.

II.A.2. Objects Accessioned (Discipline) Total

The program automatically totals the discipline and total columns in Section II.A.2. The disciplines are: archeology, ethnology, history, archives, biology, paleontology, and geology. **You cannot edit these fields.**

Note: If you made any adjustments, remember to click the Update Calculations buttons to recalculate the totals.

II.A.2. Notes

Memo field (F12 or right-click and select zoom to expand).

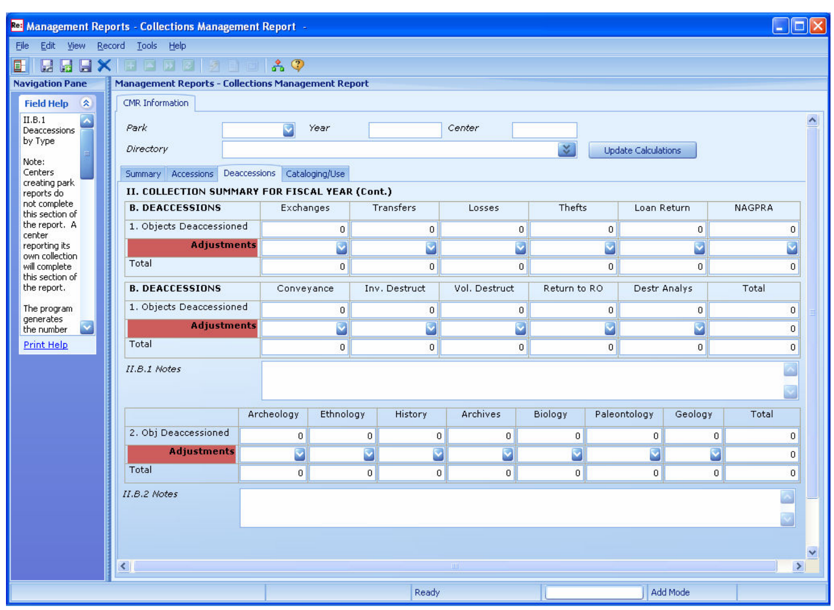
Enter explanations for adjustments to the data in section II.A.2. These comments will not appear on the final report.

The accession total by discipline must equal the accession total by acquisition type. If the totals don't match, you'll receive an error message. If you have made adjustments, make sure the amounts match in both sections. You'll be unable to save the CMR until you correct the error. This validation is disabled for center reports.

2. *What do I do after completing Section II.A?*

Go to the Deaccessions screen to continue. Click the Deaccession tab or press Ctrl-N to advance to the next page.

F. Deaccessions Screen



1. *How do I complete Section II.B. Deaccessions?*

Follow the field-by-field instructions for completing the fields on the screen. You can also view the on-line Field Help for each field in the Navigation Pane.

II.B.1. Objects Deaccessioned (Deaccession Type)

The program generates the number of objects by deaccession type that were deaccessioned during the fiscal year of the report. There is a column for each deaccession type and a total column. **You cannot edit these fields, but you can adjust the numbers in them by using the adjustment fields.**

The system automatically totals the numbers from the deaccession type columns. The deaccession types are: exchange, transfer, loss, theft, loan return, NAGPRA, conveyance, involuntary destruction, voluntary destruction, return to rightful owner, and destructive analysis.

The data for this section of the CMR comes from the CR and NH catalog records for the directories that you selected. The system pulls data from the Item Count or Item Quantity fields for each catalog record with:

a deaccession type entered in the Object Status field, and

the year in the Status Date field that equals the fiscal year of the report.

II.B.1. Objects Deaccessioned (Deaccession Type) Adjustments

You can increase or decrease the number of deaccessioned objects. These fields will accept negative numbers. There is a column for each deaccession type and a total column.

Note: Enter the amount (or increment) of change, not the new number. For example, to add 3 objects to 100 objects, enter 3 in the adjustment column, not 103. To subtract 3 objects from 100, enter -3 in the adjustment column, not 97.

If you enter any adjustments, remember to click the Update Calculations button to recalculate the totals for the deaccession type. The adjusted total will appear in the total column. The deaccession types are: exchange, transfer, loss, theft, loan return, NAGPRA, conveyance, involuntary destruction, voluntary destruction, return to rightful owner, and destructive analysis.

II.B.1. Objects Deaccessioned (Deaccession Type) Total

The program automatically totals the deaccession type and total columns in Section II.B.1. The deaccession types are: exchange, transfer, loss, theft, loan return, NAGPRA, conveyance, involuntary destruction, voluntary destruction, return to rightful owner, and destructive analysis. **You cannot edit these fields.**

Note: If you made any adjustments, remember to click the Update Calculations buttons to recalculate the totals.

II.B. Notes

Memo field (F12 or right-click and select zoom to expand).

Enter explanations for adjustments to the data in section II.B.1. These comments will not appear on the final report.

II.B.2. Objects Deaccessioned (Discipline)

The program generates the number of objects by discipline that were deaccessioned during the fiscal year of the report. There is a column for each discipline and a total column. **You cannot edit these fields, but you can adjust the numbers in them by using the adjustment fields.**

The system automatically totals the numbers from the discipline columns. The disciplines are: archeology, ethnology, history, archives, biology, paleontology, and geology.

The data for this section of the CMR comes from the CR and NH catalog records for the directories that you selected. The system pulls data from the Item Count or Item Quantity fields for each catalog record with:

> ***a deaccession type entered in the Object Status field, and***
>
> ***the year in the Status Date field that equals the fiscal year of the report.***

Discipline is determined by the first line of the classification (fourth line of the classification for archives).

II. B.2. Objects Deaccessioned (Discipline) Adjustments

You can increase or decrease the number of deaccessioned objects. These fields will accept negative numbers. There is a column for each discipline and a total column.

Note: Enter the amount (or increment) of change, not the new number. For example, to add 3 objects to 100 objects, enter 3 in the adjustment column, not 103. To subtract 3 objects from 100, enter -3 in the adjustment column, not 97.

If you enter any adjustments, remember to click the Update Calculations button to recalculate the totals for the discipline. The adjusted total will appear in the total column. The disciplines are: archeology, ethnology, history, archives, biology, paleontology, and geology.

II.B.2. Objects Deaccessioned (Discipline) Total

The program automatically totals the discipline and total columns in Section II.B.2. The disciplines are: archeology, ethnology, history, archives, biology, paleontology, and geology. **You cannot edit these fields.**

Note: If you made any adjustments, remember to click the Update Calculations buttons to recalculate the totals.

II.B.2. Notes

Memo field (F12 or right-click and select zoom to expand).

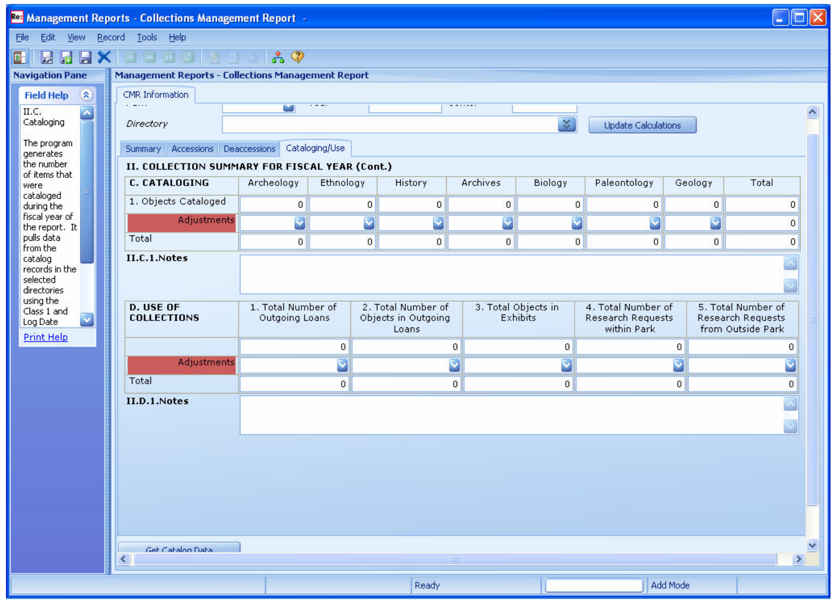
Enter explanations for adjustments to the data in section II.B.2. These comments will not appear on the final report.

The deaccession total by discipline must equal the deaccession total by deaccession type. If the totals don't match, you'll receive an error message. If you have made adjustments, make sure the amounts match in both sections. You'll be unable to save the CMR until you correct the error. This validation is disabled for center reports.

2. *What do I do after completing Section II.B?*

Go to the Cataloging/Use screen to continue. Click on the Cataloging/Use tab or press Ctrl-N to advance to the next page.

G. Cataloging/Use Screen



1. *How do I complete Section II.C. Cataloging?*

Follow the field-by-field instructions for completing the fields on the screen. You can also view the on-line Field Help for each field in the Navigation Pane.

II.C.1. Objects Cataloged

The program generates the number of objects that were cataloged during the fiscal year of the report. There is a column for each discipline and a total column. **You cannot edit these fields, but you can adjust the numbers in them by using the adjustment fields.**

The system automatically totals the number of objects cataloged for all disciplines. The disciplines are: archeology, ethnology, history, archives, biology, paleontology, and geology.

The data for this section of the CMR comes from the CR and NH catalog records for the directories that you selected. The system pulls data from the Item Count or Item Quantity fields for each catalog record with a Logger Date within the fiscal year of the report. Discipline is determined by the first line of the classification (fourth line of the classification for archives).

The CMR does not count records for objects that have been deaccessioned, and the CMR does not count records with an Object Status of:

- Draft Record
- Loan Returned
- Incorporated into Larger Archival Collection
- Record Inactive
- Removed-Non-Museum Property

II.C.1. Objects Cataloged Adjustments

You can increase or decrease the number of cataloged objects. These fields will accept negative numbers. Place a reason for the modification in the II.C.1. Notes section. There is a column for each discipline and a total column.

Note: Enter the amount (or increment) of change, not the new number. For example, to add 3 objects to 100 objects, enter 3 in the adjustment column, not 103. To subtract 3 objects from 100, enter -3 in the adjustment column, not 97.

If you enter any adjustments, remember to click the Update Calculations button to recalculate the totals for the discipline. The adjusted total will appear in the total column. The disciplines are: archeology, ethnology, history, archives, biology, paleontology, and geology.

II.C.1. Objects Cataloged Total

The program automatically totals the discipline and total columns in Section II.C.1. The disciplines are: archeology, ethnology, history, archives, biology, paleontology, and geology. **You cannot edit these fields.**

Note: If you made any adjustments, remember to click the Update Calculations buttons to recalculate the totals.

II.C.1. Notes

Memo field (F12 or right-click and select zoom to expand).

Enter explanations for adjustments to the data in section II.C.1. These comments will not appear on the final report.

2. *How do I complete Section II.D. Use of Collections?*

Follow the field-by-field instructions for completing the fields on the screen. You can also view the on-line Field Help for each field in the Navigation Pane.

II.D.1. Use of Collections-Total Number of Outgoing Loans

The program generates the number of outgoing loans for the fiscal year of report if you:

- have a loan in the Loans Out associated module
- the loan is active for all or part of the fiscal year of the report

You cannot edit this field, but you can adjust the numbers in it by using the adjustment field. You must adjust the numbers if you have current loans that are not recorded in **ANCS+**.

If you have an object count in II.D.2. Objects in Outgoing Loans, but you have no loans entered in ANCS+, the program will not let you save the CMR until you enter an adjustment number in II.D.1. You must have a count for Outgoing Loans if you have an object count for Objects in Outgoing Loans (II.D.2).

II.D.2. Use of Collections-Total Number of Objects in Outgoing Loans

The program generates the number of objects in outgoing loans for the fiscal year of report. The program pulls data from the Item Count or Item Quantity fields for each CR and NH catalog record with:

- a loan out entry in the Object Status supplemental record, and
- a date in the Object Status supplemental record that falls within the fiscal year of report

You cannot edit this field, but you can adjust the numbers in it by using the adjustment field. You must adjust the numbers if you have current loans that are not recorded in **ANCS+**.

II.D.3. Use of Collections-Total Objects in Exhibits

The program generates the number of objects in exhibits for the fiscal year of the report. The program pulls data from the Item Count or Item Quantity fields for each CR and NH catalog record with:

- an exhibit entry in the Object Status supplemental record, and
- a date in the Object Status supplemental record that falls within the fiscal year of the report

You cannot edit this field, but you can adjust the numbers in it by using the adjustment field. You must adjust the numbers if you have objects on exhibit that are not recorded in **ANCS+**.

II.D.4. Use of Collections-Total Number of Research Requests within Park.

The program doesn't generate data for this field. Use the Adjustment field for this column to enter the number of research requests from within the park.

II.D.5. Use of Collections-Total Number of Research Requests from outside Park

The program doesn't generate data for this field. Use the Adjustment field for this column to enter the number of research requests from outside the park.

II.D.1-5. Use of Collections-Adjustments

You can increase or decrease the number in fields 1-3. These fields will accept negative numbers.

Note: Enter the amount (or increment) of change, not the new number. For example, to add 3 objects to 100 objects, enter 3 in the adjustment column, not 103. To subtract 3 objects from 100, enter -3 in the adjustment column, not 97.

If you make adjustments, remember to click the Update Calculations button to recalculate the totals for these fields.

II.D.1-5. Use of Collections-Total

The program automatically totals the columns in Section II.D.1-5. **You cannot edit these fields.**

Note: If you made any adjustments, remember to click the Update Calculations buttons to recalculate the totals.

II.D.1. Notes

Memo field (F12 or right-click and select zoom to expand).

Enter explanations for adjustments to the data in section II.D.1-5. These comments will not appear on the final report.

3. *What do I do after completing Section II.D?*

Go to the Summary screen Section III to continue. Click on the Summary tab or press Ctrl-R three times to return to the Summary page.

H. Summary Screen Section III

Sections III appears on the Summary screen, but you should not complete it until you complete Section II on the Accessions, Deaccessions, and Cataloging/Use screens.

1. *How do I complete Section III. Total Collection Summary for All Years?*

Follow the field-by-field instructions for completing the fields on the screen. You can also view the on-line Field Help for each field in the Navigation Pane.

III.A. Objects Cataloged

The program generates the number of objects in the collection for all years. There is a column for each discipline and a total column. The disciplines are: archeology, ethnology, history, archives, biology, paleontology, and geology.

The numbers in the Objects Cataloged columns equal:

- the objects cataloged in previous years (and adjustments), *plus*
- the objects cataloged for the current year (and adjustments), *minus*
- the objects deaccessioned in the current year (and adjustments)

You cannot edit these fields, but you can adjust the numbers in them by using the adjustment fields in Sections I and II.

III.B. Catalog Backlog

The program generates the number of objects in the collection that have not yet been cataloged. There is a column for each discipline and a total column. The disciplines are: archeology, ethnology, history, archives, biology, paleontology, and geology.

The numbers in the Catalog Backlog columns equal:

- the catalog backlog from the previous year's report (and adjustments), *plus*
- the objects accessioned in the current year (and adjustments), *minus*
- the objects cataloged for the current year (and adjustments)

You cannot edit these fields, but you can adjust the numbers in them by using the adjustment fields in Section I and II.

III.C. Total Collection

The program automatically totals the objects cataloged and catalog backlog in Section III. **You cannot edit these fields.**

Note: If you made any adjustments in Sections I or II, remember to click the Update Calculations buttons to recalculate the totals.

III. Notes

Memo field (F12 or right-click and select zoom to expand).

Enter comments about data in Section III. These comments will not appear on the final report.

Noteworthy

Memo field (F12 or right-click and select zoom to expand).

Describe accessions and deaccessions that are noteworthy to the park. Give details on losses or thefts, listing the total value of losses, if known. You may want to list major achievements related to the collection. Provide any additional comments, especially concerning discrepancies.

Comments in the Noteworthy field will appear on the final CMR.

Completion Information (Comp Info)

Formatted memo field. Press F12, click the formatted memo icon on the field or right-click and select zoom to expand the field. The field will also expand as you begin to type.

The field will expand into five subfields: Completed By, Date, Title, Phone, and Approval. An underline separates the subfield entries on the screen.

Completed By (memo field):

Enter the name of the person who completed the report. **To save a CMR, you must complete this field.**

Date (flexible date field):

Enter the date that the report was completed. Enter a two-digit month, a two-digit day, and the full year.

Example: 06/27/2006

You can enter the date or click the flexible date icon for the flexible date entry screen. The flexible date allows you to enter a beginning and ending date. Refer to Chapter 1, System Basics, for additional information on flexible date fields. Use of the flexible date entry screen is optional.

Title (memo field):

Enter the title of the person who completed the report.

Phone (memo field):

Enter the phone number of the person who completed the report.

Approval (straight entry field):

Enter the name of the person who will approve and sign the report. The superintendent must sign the park report. The center or repository manager must sign the center or repository report.

2. *When do I save my CMR?*

When you have completed the data entries on all screens, click on Save and Close at the bottom right of the screen (you will have to scroll down to see the link).

Note: You can also click the Save link to save the record. Save leaves the record window open while Save and Close closes the record window after it has been saved.

I. CMR Verification Reports

1. *How can I verify the numbers on my CMR?*

There are four reports to help you verify the numbers on your CMR. Use the CMR verification reports to check the CMR-generated numbers. The reports can help you determine accurate numbers for making manual adjustments on the CMR.

2. *Where are the CMR verification reports located?*

Access three of the CMR verification reports from the catalog screen.

- CMR Catalog Count for Tag verifies numbers in CMR Section II.C., or the number of cataloged objects by discipline, for a subset of records in a tag set.

- CMR Catalog Count for Year verifies numbers in CMR Section II.C., or the number of cataloged objects by discipline, for all records for the fiscal year.

- CMR Deaccession Verification verifies numbers in CMR Section II.B. Deaccessions.

Access the accessions verification report from the Accessions associated module screen.

- CMR Accession Verification verifies numbers in CMR Section II.A. Accessions

3. *How do I access the CMR verification reports?*

To access the CMR verification reports from either the catalog screen or accessions screen (depending on which report you are running):

- If necessary, first create your subset according to the report you are running (see each report description below for what subset to create, if any)

- Click the Rediscovery reports button on the button bar, *or*

- Go to the Record menu, select Reports and then Re:discovery Reports.

4. *How do I run the CMR Catalog Count for Tag to verify the CMR cataloging numbers?*

The CMR Catalog Count for Tag report lists the item count and quantity for CR or NH catalog records by discipline contained within a tag set or filter. To run the report:

- Activate a tag set or filter for the catalog records. **Note:** You can use the Built In Filter "Recently Added" and use the between dates option (e.g., 10/1/2005 to 9/30/2006) to find all your records entered for the year. Refer to Section II.D. of Chapter 7 for information on activating a built in filter and Section III for creating tag sets.

- Choose the CMR Catalog Count for Tag report in the Re:discovery Reports window.

- Click Run for All Visible Records.

- Select the destination (Printer or Screen) and click Print.

The report totals the item count and item quantity in the same way the CMR does:

- Item Count = Item Count

- Item Quantity = 1 for every record where Item Quantity is greater than zero, except for archives.

- Archives = Item Quantity x 1600 for every record where Storage Unit is LF (linear feet) or CF (cubic feet).

Note: This report **DOES NOT** automatically exclude DRAFT, DEACC, and other records that the CMR excludes.

You will have to run this report twice: once in the CR directory and once in the NH directory.

5. *How do I run the CMR Catalog Count for Year to verify the CMR cataloging numbers?*

The CMR Catalog Count for Year shows the number of cataloged records in a directory through the given fiscal year.

To run the report:

- Select the CMR Catalog Count for Year report in the Re:discovery Reports window.
- Click <u>Run for All Visible Records</u>
- Select the destination and click Print.
- When prompted for the year, enter the 4-digit fiscal year (e.g., 2006).

The report totals the item count and item quantity in the same way the CMR does:

- Item Count = Item Count
- Item Quantity = 1 for every record where Item Quantity is greater than zero, except for archives.
- Archives = Item Quantity x 1600 for every record where Storage Unit is LF (linear feet) or CF (cubic feet).

Note: The "Other" discipline includes objects where the catalog record has non-standard data in the Class 1 field. This report **DOES** automatically exclude DRAFT, DEACC, and other records that the CMR excludes.

You will have to run this report twice: once in the CR directory and once in the NH directory.

6. *How do I run the CMR Deaccession Verification to verify the CMR deaccession numbers?*

The CMR Deaccession Verification report lists the item count and quantity for deaccessioned CR or NH records. The report tells you the number of objects by discipline and deaccession type. It also provides the total number of objects that were deaccessioned.

To run the report:

- Complete an advanced word search for all CR or NH records with a "Deacc" entry in the Objects Status field and the fiscal year in the Status Date field (e.g., e=deacc and e=2006). Refer to Section I of Chapter 7 for information on word search.
- Choose the CMR Deaccession Verification report in the Re:discovery Reports window.
- Click <u>Run for All Visible Records</u>.
- Select the destination (Printer or Screen) and click Print.

The report totals the item count and item quantity in the same way the CMR does:

- Item Count = Item Count

- Item Quantity = 1 for every record where Item Quantity is greater than zero, except for archives.

- Archives = Item Quantity x 1600 for every record where Storage Unit is LF (linear feet) or CF (cubic feet).

You will have to run this report twice: once in the CR directory and once in the NH directory.

7. *How do I run the CMR Accession Verification report to verify the CMR accession numbers?*

The CMR Accession Verification report lists the actual and estimated numbers for accessions. The report tells you the number of objects by discipline and acquisition type. It also provides the total number of objects that were accessioned. The report totals the actual and estimated objects in the same way the CMR does. It uses:

- actual numbers, if available
- estimated numbers, if there is no entry in the actual field
- no numbers in the bulk field, with the exception of archives
- the bulk number of Cubic Feet or Linear Feet multiplied by 1,600 for archives

Go to the Accessions associated module to run the report. To run the report:

- Activate a filter for the acquisition dates within the fiscal year of report. Refer to Section II of Chapter 7 for information on filters.
- Choose the CMR Accession Verification report in the Re:discovery Reports window.
- Click Run for All Visible
- Select the destination (Printer or Screen) and click Print.

J. Error Messages

1. *Does **ANCS+** validate the CMR data?*

ANCS+ includes some basic data checking procedures for the CMR. You will see a message appear if:

- certain data are not completed
- the numbers do not add up in a logical manner

2. *How can I make the program accept my CMR?*

After you see an error message, click OK. You will be returned to the CMR record where you can correct the problem. The incorrect field will be marked with the red exclamation point symbol.

Note: You cannot save the CMR until all fields are corrected. If you cannot correct the fields, click Cancel on the record. All updated information will be lost. If this was a new record, the record will be lost.

3. *What messages appear?*

The CMR presents the following messages for various data entry problems.

The Comp Info must be entered (Summary tab)

You must complete the Completed By subfield of Comp Info in order to save the record. You should also complete the other completion information fields, such as phone number and title, but these fields are not mandatory.

[Discipline] items cataloged is negative

You'll see this message if a discipline column in Section III. Total Collection Summary for all Years is negative. This message may appear if you deaccessioned more objects than you reported as cataloged. Reducing the deaccessioning field might solve the problem. You may also need to increase the total objects cataloged for the discipline. Do this in Section I. Total Collection Summary from Previous Year.

[Discipline] backlog is negative.

You'll see this message if a discipline column in Section III. Total Collection Summary for all Years is negative. This message appears if you cataloged more objects than you reported in your backlog. Increasing the backlog from previous year field (Section I.B) might solve the problem. You may also need to increase the total objects accessioned for the discipline (Section II.A.2).

The formula used for the backlog is:

I.B. (previous year's backlog) + II.A.2 (# accessioned) – II.C. (# cataloged)

Accession total by discipline must equal total by type.

You'll see this message if the total for accessions by acquisition type (Section II.A.1) does not match the total for accessions by discipline (Section II.A.2). You must adjust the numbers to make them match. For example, if you enter five history objects in the Gift column (Section II.A.1), you must also enter "5" in the History column (Section II.A.2).

Deaccession discipline must equal total by type.

You'll see this message if the total for deaccessions by deaccession type (Section II.B.1) does not match the total for deaccessions by discipline (Section II.B.2). You must adjust the numbers involved to make them match. For example, if you enter five ethnology objects in the NAGPRA column (Section II.B.1), you must also enter "5" in the Ethnology column (Section II.B.2).

Items entered as on loan but no loans entered (Section IID)

You'll see this message if the report includes a number in the Total Number of Objects in Outgoing Loan column, but you don't have a number in the Total Number of Outgoing Loans column. Enter the number of active loans in Total Number of Outgoing Loans (Section II.D.1), or change the number of objects on loan to zero (Section II.D.2) and adjust the object status on the catalog records accordingly.

K. Printing and Submitting the CMR

1. *How do I print a CMR?*

To print the CMR which will be used for reporting purposes:

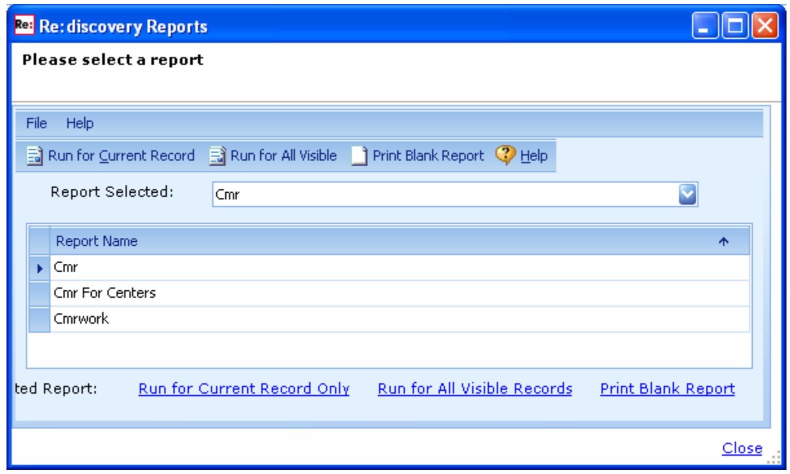
- Go to http://inside.nps.gov/cmr and click on your park acronym. Click on print in the web browser.

To print a CMR you create locally:

- Have the CMR report that you want to print in the Record Pane.

- Click the Re:discovery Report button on the button bar or select Re:discovery Reports from the Reports option on the Record menu.

- You will see a list of three reports in the Re:discovery Reports window.



- Choose Cmr to print Form 10-94Rev. (the CMR form). Choose Cmr for Centers if you are printing a Center report. Choose Cmrwork to print a worksheet that includes all the adjustment fields and part of the notes fields.

- Click <u>Run for Current Record Only</u>.

- Select the destination (Printer or Screen) and click Print.

2. *Do I have to print a CMR?*

Yes. You must print the CMR form from http://inside.nps.gov/cmr and have the superintendent or center/repository manager sign it. Keep a copy of the signed form on file in the park or center.

3. *Do I have to submit the CMR electronically?*

No. The CMR will be created for each park from the National Catalog submission the park makes.

4. *When must I submit the CMR?*

You do not submit a CMR. Submit your National Catalog submission by September 15 and an email to WASO_CMR_Submission@nps.gov. The email must include the number of research requests from within the park and from outside the park, and any noteworthy comments you want included on the CMR.

The Park Museum Management Program (PMMP) will complete a CMR for you, based on the National Catalog submission you provide.

The CMR will be accessible at http://inside.nps.gov/cmr.